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A CAHNERS PUBLICATION AUGUST 1988

graphic arts monthly

THE MAGAZINE OF THE PRINTING INDUSTRY

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Announcing the Biggest!

GAM 101

Official Industry Ranking of The Top Printing Firms

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THE MAGAZINE OF THE PRINTING INDUSTRY

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graphic arts monthly

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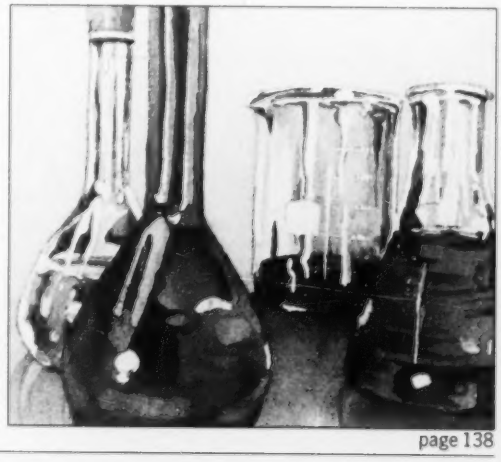

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A Year Of CHANGE

Facing this page is a detachable double-gatefold form containing the 1988 official ranking of the 101 largest printing companies in North America. The firms are ranked by sales volume for their most recently completed fiscal year, along with certain salient information—parent company (if any), sales for the preceding year, growth rate, number of employees, and so on.

In addition to the GAM 101, the detachable form contains listings of the top greeting card manufacturers, financial printers, business forms printers, and color trade shops. These listings are maintained separately to avoid distortion of the main list, which concentrates primarily on commercial and publication printers.

Once the figures are typeset in neat rows and columns, the GAM 101 looks simple. With bloodshot eyes the staff looks at the proofs across a wilderness of coffee cups and crumpled papers and thinks, That's it? That little thing? In reality, the compilation of these statistics is always a challenge, and in 1988 it was particularly challenging. The industry has been churned up by a series of mergers, acquisitions, divestitures, and bankruptcies, events reflected in the GAM 101.

When GRAPHIC ARTS MONTHLY began this listing in 1983, a major obstacle was the reluctance of the industry's privately-owned companies to reveal financial information about themselves. Although isolated pockets of resistance remain, the editors are pleased to note that cooperativeness is on the increase. There seems to be a growing agreement in the industry that, despite the inherent problems and limitations of the GAM 101, it provides a useful look at a complex and rapidly changing situation.

And there are indeed problems and limitations. Direct comparisons between one firm and another should be made keeping in mind that accounting practices vary widely in the industry. Commercial printers, for instance, generally include billings for paper in their totals; publication printers, who are supplied paper by their customers, generally do not. Many printers operate as straightforward manufacturers on demand; others more like wholesalers and distributors.

One accounting problem the editors contend with every year is the shifting relationship of the U.S. and Canadian dollar. In previous years, revenues for Canadian firms were converted at the averaged annual rate for the year in which they were earned. In a period of widely fluctuating exchange rates, this approach, while fairly accurate in terms of constant U.S. dollars, tended to give a misleading impression of these companies' health and growth patterns.

This year, sales for the most recent and prior years for Canadian firms were converted into U.S. dollars at the rate listed by the First American Bank of New York as of July 5, 1988 ($1.00 U.S. = $1.213 Canadian). While this is not a perfect solution, the editors believe it will give a more realistic picture of the growth performance of the large Canadian printers. Speaking of Canada, this year for the first time the larger Canadian color trade shops get their turn as the last section of the GAM 101 is expanded to include all North America.

The above qualifications notwithstanding, the GAM 101, now in its sixth edition, continues to attract widespread interest both within and outside the industry.

A special note of thanks goes to Assistant Editor Lisa Cross for her tireless efforts in compiling this year's listings. Other staff members heavily involved in this project were Editor Roger Ynostroza, Managing Editor Peter Johnston, and Art Director Karen Lehrer.

On request, single additional copies of the GAM 101 are available at no cost from Lisa Cross, c/o GRAPHIC ARTS MONTHLY, 249 W. 17th St., New York, NY 10011. For quantity orders, please send payment with order—$1.50 each for two to 50 copies, $1.00 each for 51 to 1,000 copies, and 50 cents each for more than 1,000 copies—to Frank Pruzina, Reprint Services, Cahners Publishing, 1350 E. Touhy Ave., Des Plaines, Ill. 60018.

graphic arts monthly

GAM 101

Official Industry Ranking Of The Top Printing Firms

This detachable double-gatefold form contains the 1988 official ranking of the 101 largest printing companies in North America, ranked by sales volume for their most recently completed fiscal year, along with salient information for each firm.

In addition, there are listings of the top greeting card manufacturers, financial printers, business forms printers, and color trade shops. These are maintained separately to avoid distortion of the main list, which concentrates on commercial and publication printers.

A word of caution: Use of the data to make direct comparisons can be very misleading, even though every effort has been made to exclude nonprinting revenues from the totals. Printing is a heterogeneous industry, and business and accounting practices vary widely. Paper, for instance, can amount to more than half of the total production cost of a printing job. Commercial printers generally include billings for paper in their totals, while publication printers generally do not.

These qualifications notwithstanding, the editors believe the GAM 101 to be the best available overview of the industry's leading companies.

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RANKING BY EMPLOYEE

1 R. R. Donnelley	22,000	34 Valassis	1,200	68 Arandell-Schmidt	450
2 Deluxe Corp.	15,346	35 Engraph	1,122	69 Continental Web	450
3 Dennison Mfg.	8,400	36 Judd's	1,113	70 Graftek Press	450
4 Lawson-Mardon	7,800	37 Interchecks	1,050	71 Holladay-Tyler	450
5 BCE Publitech	6,589	38 Haddon Craftsmen	1,025	72 Litho Prestige	450
6 Arcata	6,500	39 Lehigh Press	980	73 Standard Publishing	450
7 Quebecor	6,500	40 Monroe	950	74 Universal Printing	450
8 World Color	6,200	41 Stevens Graphics	945	75 Williamson	425
9 Maxwell	5,300	42 Shorewood Packaging	830	76 Noll	420
10 John H. Harland	5,200	43 American Signature	825	77 Anderson Litho	400
11 Southam	4,000	44 Publisher's Printing	820	78 Charles Comm.	400
12 Treasure Chest	3,900	45 Fleming Packaging	800	79 Moebius	380
13 Banta	3,700	46 Queens Group	800	80 Latham Process	366
14 Krueger	3,600	47 Waverly Press	790	81 Danbury Printing	365
15 Jostens	3,500	48 Shea Communication	750	82 Petty	360
16 Continental Graphics	3,400	49 Graphisphere Corp.	722	83 Madison/Graham	350
17 Meredith/Burda	3,036	50 American Bank Note	700	84 Henry Wurst	350
18 Brown	3,000	51 Cairn Capital	700	85 American Printers	337
19 Quad/Graphics	2,625	52 Keith Clark	700	86 L. P. Thebault	330
20 Greater Buffalo	2,550	53 Packard Press	700	87 AGI	300
21 Graphic Industries	2,525	54 Mack	687	88 Daniels	300
22 American Bank Stat.	2,500	55 Hart Graphics	650	89 Laurel Printing	275
23 Western Pub.	2,500	56 Ivy Hill	640	90 Lasky Company	273
24 G.T.C. Transcontinental	2,300	57 U.S. Banknote	620	91 Century Graphics	265
25 Krueger/Ringier	2,200	58 Combined Communications	615	92 Gunthrop-Warren	265
26 Cadmus Communications	1,950	59 Alden Press	600	93 Regensteiner	260
27 Courier Corp.	1,803	60 Webcrafters	600	94 Sandy Alexander	260
28 Clarke Checks	1,780	61 Keller Crescent	561	95 Berlin Industries	250
29 Perry	1,650	62 K/P Companies	550	96 Meehan-Tooker	250
30 Foote & Davies	1,500	63 Gulf Printing	538	97 Editors Press	235
31 Bertelsmann	1,300	64 U.S. Playing Card	515	98 Retail Graphics	220
32 Taylor Publishing	1,300	65 Empery Corp.	492	99 Printco	185
33 Alford Industries	1,202	66 George Rice	475	100 Georgian Press	140
		67 A. D. Weiss	467	101 Vernon Company	50

BUSINESS FORMS PRINTERS

Rank, Name (Parent), Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 **Moore Corporation**[1], Toronto, Ontario	$2,281,493	+ 6	26,000	M.K. Goodrich
2 **Standard Register**[1], Dayton, OH	666,700	+ 19	6,300	J. K. Darragh
3 **Uarco**, Barrington, IL	524,000	+ 10	4,500	H.L. Koelling
4 **Wallace Computer Services**[1], Hillside, IL	340,504	+ 12	2,600	T. Dimitriou
5 **Reynolds & Reynolds**[1], Dayton, OH	335,000	+ 67	5,600	R.C. Nevin
6 **American Business Products**[1], Atlanta, GA	325,768	+ 5	3,800	T. Carmody
7 **Duplex Products**[1], Sycamore, IL	278,169	+ 12	2,548	C.L. Peterson
8 **Esselte Pendaflex**, Garden City, NY	200,000**	+ 0	3,500	T.V. Kachel
9 **New England Business Service**, Groton, MA	188,416	+ 7	1,870	R.H. Rhoads
10 **SCM Allied**[1] **(Hanson PLC)**, Dayton, OH	144,000	+ 0	800	W.H. Ames
11 **Ennis**[1] Ennis, TX	117,511	+ 5	1,600	K.A. McCrady
12 **R.L. Crain**, Ottawa, Ontario	116,461	+ 5	1,071	J.F. Frank
13 **Shade Info Systems**, Green Bay, WI	75,000	+ 6	380	R.A. Shade
14 **Office Electronics**, Itasca, IL	71,500	+ 16	450	R.A. Houston
15 **United Data Products**, Fair Lawn, NJ	66,600	+ 23	380	J.S. Sockol

THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
1 **R.R. Donnelley & Sons**[1], Chicago, IL	$2,483,000	$2,234,000	+ 11	22,000	$112,863	26	*	COM	J.B. Schwemm	124
2 **Deluxe Corp.**[1], St. Paul, MN	948,010	866,829	+ 9	15,346	61,775	81	*	SPC	H.V. Haverty	73
3 **Lawson Mardon**[1], Mississauga, Ont.	853,006	672,453	+ 27	7,800	109,360	57	*	COM,SPC	L.G. Tapp	106
4 **Maxwell Communication**, Greenwich, CT	800,000**	550,000	+ 45**	5,300	150,943	15	6,168,341,4[2]	PUB	J.T. Sullivan	2
5 **Dennison Mfg. Co.**,[1] Framingham, MA	708,001	701,059	+ 1	8,400	84,286	11	6,0,25,2[2],52	COM	N.S. Gifford	144
6 **World Color Press**, Effingham, IL	640,000	604,000	+ 6	6,200	103,226	7	0,483,86,13[2],4[3]	PUB	J.A. Dawson	85
7 **BCE Publitech**[1] **(Bell Canada)**, Toronto, Ontario	583,800	522,943	+ 12	6,589	88,602		*	COM	B.H. Tavner	95
8 **Quebecor**[1], Montreal, Quebec	562,762	336,604	+ 67	6,500	86,579	25	35,325	COM	P. Peladeau	23
9 **Treasure Chest Advertising**, Glendora, CA	540,000	470,000	+ 15	3,900	138,462	18	*	INS	S.G. Scheller	21
10 **Arcata Graphics**, Baltimore, MD	500,000	500,000	0	6,500	76,923	9	*	BK	R.L. Swam	83
11 **Southam Printing**, Toronto, Ontario	443,240	357,219	+ 24	4,000	110,810	17	*	COM	M.A. Quinn	107
12 **Meredith/Burda**, Des Moines, IA	427,000	404,000	+ 6	3,036	140,646	5	0,63,164	COM	W.A. Voss	19
13 **Quad/Graphics**, Pewaukee, WI	415,000	317,000	+ 31	2,625	158,095	4	0,241	PUB,INS,COM	H.V. Quadracci	17
14 **Greater Buffalo Press**, Buffalo, NY	410,000	360,000	+ 14	2,550	160,784	7	0,100,0,30[1]	COM,PUB	P. Koessler	62
15 **Valassis Inserts**, (Consolidated Press U.S.), Livonia, MI	400,000	348,100	+ 15	1,200	333,333	3	0,56	INS	L.L. Johnson	19
16 **Western Publishing**[1], Racine, WI	385,000	307,000	+ 25	2,500	154,000	2	46,29,0,5[1]	BK,SPC	J.A. Marino	81
17 **Brown Printing** (Gruner + Jahr), Waseca, MN	350,000	299,500	+ 17	3,000	116,667	6	*	PUB,CAT,INS	J.K. Rifenbergh	36
18 **W.A. Krueger**[1], Scottsdale, AZ	346,362	299,302	+ 16	3,600	96,212	8	12,229,0	PUB,BK,COM	J.W. Fowler	54
19 **George Banta**[1], Menasha, WI	302,000	276,000	+ 9	3,700	81,622	12	*	BK	H.W. Earle	87
20 **John H. Harland**[1], Atlanta, GA	287,700	266,100	+ 8	5,200	55,327	44	135,33,0,200[1]	SPC	J.W. Robinson	65
21 **Continental Graphics**, Los Angeles, CA	261,068	234,866	+ 11	3,400	76,785	9	32,31,0,5[2]	COM,SPC	C.F. Bourland	57
22 **Graphic Industries**[1], Atlanta, GA	223,490	167,920	+ 33	2,525	88,511	33	257,67,0,28[2]	COM	M.C. Pope III	18
23 **Krueger Ringier**, Itasca, IL	218,737	193,156	+ 13	2,200	99,426	5	16,36,92,24[1]	PUB	E.C. Nytko	3
24 **Charles Communications**, New York, NY	190,000	175,000	+ 9	400	475,000	2	10,21,0	INS	A. Bortner	43
25 **Foote & Davies**, Atlanta, GA	185,000	172,000	+ 8	1,500	123,333	2	4,163,0	PUB,COM	F.E. Kutcher Jr.	101
26 **G.T.C. Transcontinental**, Saint-Laurent, Quebec	183,347	114,194	+ 61	2,300	79,716	10	*	INS	R. Marcoux	11
27 **Cadmus Communications**[1], Richmond, VA	150,000	115,900	+ 29	1,950	76,923	7	109,40,0,5[2]	PUB,COM	W. Stettinius	4
28 **Alden Press**, Elk Grove Village, IL	148,000	136,000	+ 9	600	246,667	1	0,57,0	COM	J. Spier	42
29 **Perry Printing**, Waterloo, WI	147,400	120,000	+ 23	1,650	89,394	6	7,22,4	COM	R.L. Perry	57
30 **American Bank Stationery**, Baltimore, MD	140,000	132,000	+ 6	2,500	56,000	30	*	SPC	E.A. Heiser	61
31 **Lehigh Press**, Pennsauken, NJ	139,160	136,085	+ 2	980	142,000	6	38,66,3[4]	COM	J.D. DePaul	64
32 **Stevens Graphics** (Bell South), Atlanta, GA	139,000	135,000	+ 3	945	147,090	12	*	SPC	H.M. Inman	91
33 **Courier Corp.**[1], Lowell, MA	138,143	122,517	+ 13	1,803	76,618	6	*	BK	J.F. Conway Jr.	164
34 **Alford Industries**, Ridgefield Park, NJ	135,174	112,287	+ 20	1,202	112,458	26	*	SPC	R.P. Kane	26
35 **Jostens**[1], Minneapolis, MN	125,000	119,000	+ 5	3,500	35,714	5	50,0,0	BK	H.W. Lurton	51
36 **Engraph**[1], Atlanta, GA	122,800	108,800	+ 13	1,122	109,447	7	30,4,36[2],44[1],16[4],10[5]	SPC	L. Benatar	55
37 **American Signature Graphics**, Memphis, TN	115,000	98,000	+ 17	825	139,394	3	30,59,0	PUB,CAT	T.A. Tevis	51
38 **Keller Crescent**, Evansville, IN	114,526	108,885	+ 5	561	204,146	1	*	COM	T.M. Smythe	103
39 **Clarke Checks** (Metal Box PLC), San Antonio, TX	107,532	102,348	+ 5	1,780	60,411	26	32,9,112[2]	SPC	J.E. Coln	114
40 **Keith Clark**, Sidney, NY	100,000**	65,000	+ 54	700	142,857	1	6,16,0	SPC	D.B. Willies	65
41 **Shea Communication**, Louisville, KY	100,000	60,000	+ 67	750	133,333	2	0,23,77	COM	M. Shea	(New)
42 **Shorewood Packaging**[1], Farmingdale, NY	98,975	78,000	+ 27	830	119,247	1	*	SPC	P. Shore	22
43 **Graphisphere Corp.**, Des Plaines, IL	98,000	75,000	+ 31	722	135,734	3	58,26,0,4[1]	COM	G.R. Dorn	25
44 **Judd's**, Washington, DC	92,751	91,200	+ 2	1,113	83,334	3	3,93,0	PUB	T.A. Manning	120
45 **Fleming Packaging**, Peoria, IL	87,000	80,000	+ 9	800	108,750	7	70,7,9,8[2],40[3],4[4]	SPC	T.J. Fleming	54
46 **George Rice**, Los Angeles, CA	86,420	79,481	+ 9	475	181,937	1	30,24,0	COM	E. Grossberg	109
47 **Taylor Publishing (Insilco)**, Dallas, TX	82,600	77,500	+ 7	1,300	63,538	4	57,0,0,3[2]	BK	R.B. Marston	49
48 **Queens Group**, Long Island City, NY	81,465	71,423	+ 14	800	101,831	4	92,32,0,6[1]	SPC	E. Kaltman	57
49 **Bertelsmann Printing & Mfg. Corp.**, Berryville, VA	77,000	N.A.	N.A.	1,300	59,231	6	54,32,0,12[2]	BK,SPC	R. Hampp	2
50 **Meehan-Tooker**, East Rutherford, NJ	75,000	65,000	+ 15	250	300,000	2	6,47,0	COM	M. Voss	69
51 **Arandell-Schmidt**, Menomenee Falls, WI	70,685	52,558	+ 34	450	157,078	1	8,24,0	COM	F.E. Treis	66
52 **Ivy Hill**, New York, NY	70,000	60,000	+ 17	640	109,375	3	96,0,0	SPC	E. Kern	74
53 **Monroe Printing**, E. Stroudsburg, PA	69,000	69,500	- 1	950	72,632	4	62,61,0	COM,SPC	R.D. Hughes	18
54 **Anderson Litho**, Los Angeles, CA	67,000	68,000	- 1	400	170,000	1	30,18,0	COM	G.T. Parana	34

THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
55 Cairn Capital, Don Mills, Ontario	$65,952**	$70,943	– 7	700	$ 94,217	8	*	COM	D.M. Alloway	42
56 Packard Press[1] (Basix), Philadelphia, PA	65,000	65,000	0	700	92,857	8	*	COM	L.D. Lavers	35
57 American Bank Note[1] (International Banknote), New York, NY	63,664	66,430	– 4	700**	90,949**	3	*	SPC	E.H. Weitzen	193
58 Interchecks[1] (Norton Opax PLC), Seattle, WA	62,000	55,650	+ 11	1,050	59,048	13	17.13.14[9]	SPC	E. Langley	61
59 Empery Corp., Paoli, PA	61,000	53,000	+ 15	492	123,984	6	3.17.0.49.9[3]	SPC	A.J. Clegg	9
60 Mack, Easton, PA	60,892	53,999	+ 13	687	88,635	1	13.29.0	PUB	P.F. Mack	87
61 Continental Web, Itasca, IL	60,000	47,913	+ 25	450	133,333	1	*	COM	K.W. Field	15
62 Hart Graphics, Austin, TX	60,000	47,000	+ 28	650	92,308	4	*	COM	W.L. Hart	15
63 Publisher's Printing, Shepeardsville, KY	60,000**	56,000	+ 7	820	73,171	1	11-51.0	PUB	F.E. Simon	122
64 Moebius, Milwaukee, WI	58,000	52,000	+ 12	380	152,632	2	15.31.0	COM	M.C. McDonough	77
65 United States Banknote, New York, NY	58,000	58,000	0	620	93,548	3	45.24.0.10.14	SPC	M. Weissman	118
66 Petty, Effingham, IL	55,000	40,000	+ 38	360	152,778	1	0.45.0	COM,INS	G.A. Whaling	10
67 Lasky Company, Milburn, NJ	54,000	55,000	2	273	197,802	1	20.23.0	COM	R.H. Barnard	71
68 Vernon Company, Newton, IA	54,000	51,000	+ 6	50	1,080,000	2	7.0.0.5[3]	SPC	W.F. Vernon	86
69 Webcrafters, Madison, WI	54,000	50,000	+ 8	600	90,000	2	3.50.0.3[3]	BK	J.J. Frautschi	98
70 Holladay-Tyler[1] (Southam), Glenndale, MD	53,477	50,028	+ 7	450	118,838	1	0.45.4[3]	PUB	H.D. Sullivan	52
71 U.S. Playing Card[1], New York, NY	52,000**	48,000	+ 8	515	100,971	3	*	SPC	R. Rule	103
72 Gulf Printing, (Southwestern Bell), Houston, TX	51,500	42,200	+ 25	538	95,725	4	31.28.0.3[3]	COM	R.D. Cashman	72
73 Madison/Graham Colorgraphics, Los Angeles, CA	50,000	43,000	+ 16	350	142,857	3	*	COM	C.N. Madison	35
74 Combined Communications, Lisle, IL	49,439	47,036	+ 5	615	80,389	2	*	PUB	R. Sanderson	42
75 Haddon Craftsmen, Scranton, PA	47,000	42,000	+ 12	1,025	45,854	1	4.14.0	BK	B.C. Jones	85
76 Litho Prestige (Unimedia), Drummondville, Quebec	46,991	44,528	+ 6	450	104,424	2	0.31.0.1[10]	CAT	E. Ferrat	35
77 Sandy Alexander (Mickleberry Corp.), Clifton, NJ	45,800	36,500	+ 25	260	176,154	1	21.16.0	COM	F. Stillo	24
78 L.P. Thebault, Parsippany, NJ	45,000	39,000	+ 15	330	136,364	1	29.11.0	COM	J.B. Thebault	34
79 Waverly Press, Baltimore, MD	44,328	42,853	+ 3	790	56,111	2	40.12.0	PUB	W.M. Passano Jr	98
80 Century Graphics, Metarie, LA	44,000	40,000	+ 10	265	166,038	2	0.16.0	INS	C.J. Eberts	32
81 Universal Printing, St. Louis, MO	43,600	42,000	+ 4	450	96,889	2	47.28.0	COM	R.A. Ebel	49
82 Berlin Industries, Addison, IL	43,500	37,000	+ 18	250	174,000	1	0.42.0	COM	F.E. Schmitt	67
83 K/P Companies, Berkeley, CA	43,013	35,628	+ 20	550	78,205	14	87.16.0.15[7]	COM	J.W. Knapp	22
84 Danbury Printing, Danbury, CT	42,500	42,500	0	365	116,438	1	23.30.0	COM	M. Previdi	42
85 Retail Graphics (RGP Corp.), Dallas, TX	42,500	35,000	+ 21	220	193,182	2	*	INS	J. Brown/ L. Thompson	5
86 Noll (Our Sunday Visitor), Huntington, IN	42,473	42,248	+ 0.5	420	101,124	1	0.5.0	COM	D.E. Scheiber	10
87 Henry Wurst, N. Kansas City, MO	42,000	40,000	+ 5	350	120,000	2	0.38.0	COM	J.C. Wurst	51
88 Regensteiner Chicago, IL	40,000	46,500	– 14	260	153,846	1	0.34.0	COM,PUB	R. Matthews	81
89 Williamson, Dallas, TX	40,000	35,000	+ 14	425	94,118	3	44.11.0.8[3]	COM	J.B. Williamson	104
90 Gunthrop-Warren, Broadview, IL	38,000	30,000	+ 27	265	143,396	1	29.27.0	COM,PUB	P.L. Warren	94
91 Daniels, Everett, MA	36,600	31,100	+ 18	300	122,000	1	40.4.0	COM	L. Daniels	108
92 American Printers & Lithographers, Chicago, IL	36,400	35,000	+ 4	337	108,012	1	62.0.0.6[3]	SPC	R.B. Lifton L. Jaffee	77
93 Standard Publishing[1] (Standex International), Cincinnati, OH	36,272	32,836	+ 10	450	80,604	1	8.16.0	COM	F.D. Mosher	122
94 Latham Process Corp., New York, NY	36,000**	34,100	+ 6	366	98,361	2	17.52.0	COM	R. Gombach	48
95 Printco, Greenville, MI	35,800	29,670	+ 21	185	193,514	2	0.48.0	INS	J.A. Pentecost	20
96 Graftek Press[1] (Devon Group), Woodstock, IL	34,700	34,700	0	450	77,111	2	7.56.0	PUB	S.B. Pearlman	21
97 AGI, Melrose Park, IL	33,600	32,000	+ 5	300	112,000	1	*	SPC	R. Block	20
98 Georgian Press, New York, NY	32,000	35,000	– 9	140	228,571	2	5.23.0	COM	J.J. Lehman	68
99 Laurel Printing, Elmsford, NY	32,000	30,000	+ 7	275	116,364	1	*	COM	B. Grossman	76
100 Editors Press (Kiplinger), Hyattsville, MD	31,000	29,800	+ 4	235	131,915	1	4.25.0	PUB	K. King	36
101 A.D. Weiss Litho[1] (Eagle Picher), Hollywood, FL	31,000	32,000	– 3	467	66,381	1	0.88.0	PUB	M.H. Streibig	40

EXPLANATION OF ABBREVIATIONS

COM Commercial Printing
PUB Publications
BK Books
CAT Catalogs
SPC Specialty
INS Inserts

FOOTNOTES

[1] Publicly held
[2] Letterpress
[3] Flexo
[4] Screen press
[5] Die-cutting
[6] Gold leaf press
[7] Sheetfed intaglio
[8] Forms press
[9] Coaster press
[10] Cameron belt press
[11] Coater
* Information not available
** Estimated

GREETING CARD PRINTERS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 Hallmark Cards, Kansas City, MO	$2,000,000**	0**	19,000	I.O. Hockaday
2 American Greetings, Cleveland, OH	1,400,000	+ 24	14,000	M. Weiss
3 Gibson Greetings, Cincinnati, OH	359,583	+ 11	5,500	B. Sottile

FINANCIAL PRINTERS

Rank, Name (Parent), Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 Bowne & Co.[1], New York, NY	$217,000	+ 22	1,900	F.v. Ziegesar
2 Chas. P. Young[1], New York, NY	117,000	– 8	1,000	N.C. Kane
3 Sorg[1], New York, NY	70,000	– 7	690	R.A. Cardia

COLOR TRADE SHOPS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Equipment: Scanners	Equipment: Color Pagination Systems	CEO
1 Techtron Imaging Network, Chicago, IL	83,000	+ 4	21	8	J.J. Collins
2 Kordet Group, Oceanside, NY	58,000	+ 45	10	7	P. Faucetta
3 American Color, Phoenix, AZ	49,000	+ 17	25	8	D. Brazell
4 Schawk, Des Plaines, IL	48,000	+ 14	17	11	C. W. Schawk
5 Enteron Group, Chicago, IL	45,000	+ 80	6	3	J. J. Reilly
6 Lanman Companies, Washington, DC	28,500	+ 14	11	3	T.H. Cunningham
7 Potomac Graphic Industries, New York, NY	26,500	+ 2	4	5	J. M. Lane
8 Gold Coast Graphics, Sunrise, FL	24,000	+ 20	3	3	R. Bogart
9 Jannock Imaging, Toronto, Ontario	20,661	+ 32	3	3	W. H. Batten
10 Blanks Engraving, Dallas, TX	17,500	+ 15	4	1	L. Blanks
11 Kwik International Color, New York, NY	17,200	+ 9	3	2	R. J. Sirota
12 Black Dot Graphics, Crystal Lake, IL	16,458	+ 5	3	1	E. T. Connor
13 Rex Three, Miami, FL	15,600	+ 1	4	2	J. Miller
14 Magna Graphic, Lexington, KY	14,800	+ 35	2	1	K. Engle
15 Spectrum, Minneapolis, MN	14,400	+ 11	5	4	M. Murray
16 Herzig Sommerville, Toronto, Ontario	13,685	+ 23	3	5	E. Herzig
17 Wilson Engraving, Dallas, TX	13,500	+ 4	2	2	E. L. Green Sr.
18 NEC Inc., Nashville, TN	12,800	+ 11	4	4	R. W. Luckett
19 Jalor Color Process, New York, NY	12,500	+ 47	5	4	I. Finkelstein
20 Keiffer-Nolde, Chicago, IL	12,000	+ 9	2	1	W. B. Riggs
21 Beck Company, Langhorne, PA	11,000	– 16	3	1	F. I. Beck
22 Photo Mechanical Services, Minneapolis, MN	11,000**	+ 16	5	1	C. T. Austin

Profiling The TOP 25

Supplementing this issue's GAM 101 ranking of the largest printing companies in North America—a ranking based on annual sales revenues—are these profiles of the top 25 firms and chief executive officers. Coverage here was compiled from information supplied by the firms and from other sources.

The largest printing company in North America—also one of the oldest at 124 years—is a consistent performer, regularly posting annual sales increases of at least 10%; this level is noteworthy considering its overall sales, which reached $2.483 billion in the past year. R.R. Donnelley & Sons Company, Chicago, is of staggering size, accounting for 22,000 employees, 22 printing sites in the U.S. plus four in England, and 14 subsidiaries stretching from Barbados to the Far East and encompassing satellite services, typesetting, and a bank.

Long a dominant force in books, magazines, catalogs, directories, financial printing services, and electronic graphics, Donnelley is now expanding into information services and database management. Last year it acquired Metromail, a 2,000-employee, seven-site firm based in Lincoln, Neb., that collects, analyzes, organizes, and packages consumer information for use in direct mail and telemarketing programs. By combining Metromail capabilities with its Selectronic binding and sortation system, Donnelley aims to capitalize on targeted distribution of its printed products.

Other recent developments of note: Pulsar, which offers catalog merchandisers a virtually paperless and filmless electronic publishing system from copy to cylinder engraving via direct digital link, and an agreement with Eastman Kodak to develop, manufacture, and market computerized bindery line imaging and gathering systems for printing personalized information in publications.

By Roger Ynostroza
Editor

John B. Schwemm, 54, continues as chairman and chief executive officer.

As expected, Deluxe Check Printers, Inc., St. Paul, Minn., is asking its shareholders to approve a name change to Deluxe Corporation to reflect its expansion beyond the printing of checks and transaction forms. The proposal is significant in a year in which the company aims to break the billion-dollar revenue mark.

Deluxe is another consistent performer: 1987 was its 49th consecutive year of increased sales and its 35th year in a row of higher earnings, 9.4% and 22.6%, respectively. Deluxe is ranked #2 on the GAM 101 list, with $948 million in annual sales.

The company has already begun expanding—from the period 1985 to 1987, check printing dropped from 96% of total sales to 85%—specifically, into electronic funds transfer, direct-mail marketing of greeting cards, stationery, and related consumer specialty products. In late 1987 Deluxe completed its acquisition of Looart Press and its subsidiary Current, Inc., the nation's largest direct mail marketer of greeting cards, etc.

In 1987 Deluxe spent $61.7 million in capital improvements in 1987, up from $37 million in 1986.

Harold V. Haverty, president and CEO, marks his 34th year with Deluxe.

In fiscal 1987, Lawson-Mardon Group, a 106-year-old packaging and commercial printing firm in Mississauga, Ontario, reorganized as a buyout three years ago, broke the billion-dollar mark (Canadian currency). When converted to U.S. dollars, that revenue figure represents an increase of some 27% over fiscal 1986, even though the number of plant sites listed decreased six, to 57.

Lawson-Mardon is ranked #3, with $853 million in sales.

Lawrence G. Tapp, 49, continues as president and CEO.

Continuing its aggressive stance in the U.S., Maxwell Communication, Greenwich, Conn., while reporting sales revenue of $550 million for fiscal 1987, estimates 1988 gross sales of $800 million for its printing op-

erations. This makes it #4 in the GAM 101 ranking. The figure does not include telecommunications, publishing, and database management businesses, which reportedly push the total to $1 billion (see story, p. 60).

Newest specialty: Target Bound system of ink-jet addressing tied to database capabilities recently acquired.

CEO James T. Sullivan, 49, joined the company at start-up in late 1986.

Dennison Manufacturing Company, Framingham, Mass., had a slight increase in sales, to $708 million (#5 ranking) in fiscal 1987. It operates 11 printing plants in the U.S. and eight in foreign countries, plus 16 major subsidiaries throughout the world. It reports advances in the development of ion printing, a method of high-speed, nonimpact electronic printing that competes with laser imaging.

Stated business strategy is to focus on the core businesses through capital improvements, new product development, and selective acquisitions.

Nelson S. Gifford, 58, continues as chairman and CEO. He joined Dennison in 1954 in the accounting department.

World Color Press, Inc., Effingham, Ill., claims the #6 spot on the GAM 101 list with projected 1988 sales of $640 million. The privately-held company has two subsidiaries—Merced Color Press in Merced, Calif., and Chemical Color Plate in Bridgeport, Conn.—and seven manufacturing sites, including Spartan Printing, Crossroads Press, Salem Gravure, VernWood Press, Oberlin Color Press, Dyersburg Division, and Covington Division. It operates nearly 600 press units, including 483 web offset and 86 rotogravure.

James A. Dawson, 50, has been president and CEO for about 18 months. He joined World Color in 1972 as vice-president of eastern sales.

R.R. Donnelley & Sons' chairman and CEO, John B. Schwemm.

BCE Publitech Inc., Toronto, a subsidiary of BCE Inc. (whose name reflects its roots as Bell Canada Enterprises), is ranked #7, with revenues of $583 million. It is a management holding firm for a family of companies representing one of North America's largest printing and directory service entities, plus commercial and specialty printing, security printing, and directory advertising and publishing markets.

Among its more well-known subsidiaries are Ronalds Printing, Case-Hoyt, Rolph-Clark-Stone Packaging, National Telephone Directory, and Penn-Del Directory Corporation. The newest is Matthews Ingham and Lake, a Toronto sheetfed printer.

On July 4, Bruce H. Tavner succeeded John E. Sinclair as chairman and CEO. Tavner has more than 30 years of BCE service; he was president of Northern Telecom Europe since 1985 and before that had been chairman and CEO of Bell Canada International from 1983.

Mainly because of currency translations, but also because of several acquisitions that

boosted its plant-site count to 25, Quebecor posted a 67% increase in annual revenue in fiscal 1987. Converted to U.S. dollars, its sales amounted to $562 million, making it #8 on the list. In all, the Montreal firm (profiled in GAM, May 1988) operates 325 web offset and 35 sheetfed press units.

CEO Pierre Peladeau, 63, founded the company 23 years ago.

Treasure Chest Advertising Company, Inc., Glendora, Calif., specializes in producing and marketing retail advertising circulars and newspaper inserts using automated electronic prepress systems, advanced commercial-quality heatset presses, and computerized inventory-management systems. The privately-held company is geographically distributed, operating 18 plants in 15 states, in or near metropolitan areas. In the recent past, it has expanded into newspaper products and general publications.

In the past fiscal year, it posted $540 million in sales, for #9 ranking. For fiscal 1988, it anticipates growth to $600 million.

Sanford G. Scheller, 57, joined the firm in May 1986 as president and CEO. He has since reorganized the corporation into a decentralized group structure designed to increase responsiveness and customer satisfaction, and reduce job turnaround time.

Arcata Graphics Company, Baltimore, a privately-held company owned by Arcata Corporation, San Francisco, serves the book, publication, and general commercial printing markets, accounting for about a half-billion dollars in annual sales each of the past two fiscal years. It is ranked #10 on the GAM 101 list. Arcata operates nine printing sites.

Robert L. Swam, 46, joined Arcata as president and CEO in January 1985.

David Willinger

Quebecor founder Pierre Peladeau. The firm posted a 67% increase in annual revenue last year.

Southam Printing Ltd., Toronto, is a privately-held, 4,000-employee firm active in commercial web, consumer printed products, business forms, and specialty printing market segments. With revenues of $443 million, it is ranked #11. Southam is organized into four groups in Canada and one in the U.S. Subsidiaries include Canadian Publishers; Gazette Canadian Printing; RBW Graphics; Southam Murray; Agency Press; McLaren, Morris and Todd; Offset Print & Litho; Southam Paragon Graphics; Empress Graphics; and Network Studios. U.S. subsidiaries include Dittler Brothers, Holladay-Tyler, LPS, and Moreno Press.

Michael A. Quinn, 47, joined Southam Printing as president and CEO in January 1987.

From corporate headquarters in Des Moines, Ia., Meredith/Burda operates five printing sites, including Des Moines; Casa Grande, Ariz.; Lynchburg, Va.; and Greensboro and Newton, N.C. The privately-held company, which is approaching the anniversary of its 20th year in business, was formed as a joint venture by Meredith Corporation and the Burda organization in Germany. It achieves a #12 ranking with sales of $427 million. It is equipped with 63 web offset and 164 rotogravure units.

President Walter A. Voss, 60, joined Meredith as a management trainee in 1957.

Quad/Graphics, Pewaukee, Wis., continues its double-digit sales revenue growth, rising 31% to $415 million, for a ranking of #13; it posted 1988 first-quarter sales at an annual pace of about a half-billion dollars. The company specializes in general commercial work, newspaper inserts, and publications and catalogs, operating plants in Pewaukee, Lomira, and Sussex, Wis., and in Saratoga Springs, N.Y. Later this year, Quad/Graphics planned to double its gravure press capacity, bringing to four the number of eight-unit, 96"-wide press lines. The company operates nearly 250 web offset press units.

(Continued on p. 46)

Quad/Graphics has several auxiliary divisions, including finishing, mailing services, transportation, training and education, and customer service.

Harry V. Quadracci continues as president and CEO of the firm he founded in 1971.

Greater Buffalo Press, Buffalo, N.Y., posted a 14% increase in sales over the previous year, to $410 million, for #14 ranking. The privately-held company, which employs 2,550, specializes in general commercial and publication work. It operates 100 web offset and 30 flexographic press units.

Paul Koessler is CEO.

Formed in 1969 as a sales agent for printing companies, Valassis Inserts claims to have introduced the freestanding insert in 1972, which revolutionized the coupon industry. From one press and five employees at its start, the company has since grown into a $400 million firm (#15 ranking in the GAM 101) employing 1,200 and producing two billion inserts a year from three highly-automated manufacturing locations.

Later this year, Quad/Graphics plans to double its gravure press capacity. Harry V. Quadracci is president and CEO.

It recently expanded into black-and-white newspaper couponing (from a new office complex in Wilton, Conn.) involving as many as 1,000 newspapers across the country, single-sponsor solo promotional inserts, and commercial printing of brochures, catalogs, and magazine inserts. In June, Valassis added its first electronic color scanner to take over separation work previously sent out and plans to install a second by year's end; in 1989 there are plans to add several color pagination systems.

In all, it operates 14 Baker Perkins web offset presses; in November of this year it will install a four-unit 75"-wide N-9000D Harris press that can produce up to 72-page signatures.

Since December 1986, Valassis has been part of Consolidated Press, an Australian firm.

Larry L. Johnson, 36, continues as president and CEO.

After a stalled sales and profit performance last year, Western Publishing Company, Racine, Wis., rebounded with a 25% gain in overall revenue in fiscal 1988 (to $385 million, #16 ranking) largely as the result of the enormous popularity of the Pictionary game, which quickly became a top-selling game in the U.S. As co-licensee and printer, Western produced some three million copies in the year. The introduction of other proprietary games, a new five-year contract with a major customer, and continued expansion of its core products also contributed to the gains.

The printing operation is part of Western Publishing Group, a publicly-held company that is the leading American publisher of children's books and now a major producer and marketer of puzzles (40% market share), games, and special-interest books for adults. Internationally, the company had product launches in Australia and New Zealand, and exhibited at the Moscow Book Fair and received its first orders from an Eastern bloc country.

In commercial printing, growth came in sales promotions for fast-food clients, baseball cards, and consumer products companies.

James A. Marino, 56, continues as president and CEO.

Brown Printing Company, Waseca, Minn., a subsidiary of Gruner + Jahr in Germany, posted a gain of 17% to an estimated $350 million in fiscal 1988 and #17 ranking. Brown specializes in publications, catalogs, and inserts in its six plants in Minne-

sota, Kentucky, Pennsylvania, and California.

Continuing as president and CEO is James K. Rifenbergh, 57.

W.A. Krueger, Scottsdale, Ariz., is a privately-held, 3,600-employee printing company specializing in general commercial, book, and publication work. In the last year, its sales approached $350 million, up some 16% from the previous year, for #18 spot on the GAM 101 list. It operates a dozen sheetfed and 229 web offset press units in its eight manufacturing sites.

Jack W. Fowler, 57, who joined Krueger in 1971 as marketing vice-president, continues as president and CEO, a post he has held for a dozen years.

The big news at the Banta Corporation, Menasha, Wis. ($302 million, #19 ranking), took place in March and involved its purchase for $24 million of the five Minnesota and Illinois printing plants of The Beddor Companies. The acquisition, which will not be reflected in annual sales figures until next year, provides Banta with access into two fast-growing printing markets—direct marketing, and consumer catalogs—plus production capability in softcover books.

Publicly-held Banta operates in three separate business segments: printing (including books, magazines, and catalogs), flexible packaging, and graphic/video services. Last year, sales were flat in the first segment but respectable in the other two. Capital expenditures were $26.8 million last year, set to rise by nearly 50% this year.

Harry W. Earle, 64, joined Banta as president and CEO in 1979, adding the title of chairman five years ago. He formerly served with McCall Corporation, Arcata Graphic, and W.A. Krueger.

Banta Corporation operates in printing, flexible packaging, and video services. Harry W. Earle is president and CEO.

From 44 nationwide locations, publicly-held John H. Harland Company, Atlanta, seeks to fulfill its slogan as "the great American check printer," specializing in the funds transfer business and other related needs of the financial community. Its two subsidiaries, Scantron Corporation in Tustin, Calif., and J. William Company in Covington, Ga., and a division, Interactive Performance Systems, indicate the company's interest in pursuing new business. Overall, John H. Harland reported revenues of $287 million, #20 ranking.

In recent years, the firm has added nonimpact printing and a computerized network to its abilities. Overall, the company operates 135 sheetfed offset press units and 200 letterpress units, plus 33 web offset press units.

J. William Robinson, 68, is chairman and CEO. He joined the company in 1950 as controller, later serving as vice-president and treasurer. His specialties include finance and accounting, long-range planning, and market strategy.

If all went according to plan recently, #21-ranked Continental Graphics, Los Angeles, has become a privately-held company in a buyout. The 57-year-old firm formerly was owned by Triton and controlled by Intermark; it was formed from U.S. Press, Rush Press, and Republic Corporation's Continental Group. Its sales in the past year amounted to $261 million.

It operates nine locations—in California, Oregon, North Carolina, and New York—and specializes in general commercial printing and specialty items. In

sheetfed, it has 132 offset and five letterpress units, plus 31 web offset press units.

Curtis F. Bourland, 60, is president and CEO. He joined the Continental Graphics division as president in 1962.

Again, through a combination of natural growth and strategic acquisition, publicly-held Graphic Industries, Inc., Atlanta, posted a double-digit gain in overall annual sales revenue for the past fiscal year. Since the GAM 101 listing began, these are the year-to-year gains and annual sales figures for Graphic Industries: from $44 million in 1983, up 72% to $76 million in 1984, up 22% to $92 million in 1985, up 40% to $130 million in 1986, up 29% to $167 million in 1987, and up 33% to $223 million in 1988 (#22 ranking). In the same period, the number of plant sites has grown to 33 from less than 20.

Chief architect of Graphic Industries' tremendous growth is Mark C. Pope III, who continues as chairman and president. His specialties: operations, finance, and acquisitions.

Krueger Ringier Inc., Itasca, Ill., a privately-held company formed in 1985 as a joint venture between W.A. Krueger of Scottsdale, Ariz., and Ringier of Zurich, Switzerland, reversed its negative performance of the two previous years and posted a sales gain of 13% in fiscal 1987, to $218 million and #23 ranking. Specializing in publication printing, the firm operates plants in Augusta, Ga.; Corinth, Miss.; Dresden, Tenn.; and Charlotte, N.C. It employs 2,200.

Edward C. Nytko joined W.F. Hall Printing Co., the firm that provided the basis for Krueger Ringier, in 1965. He continues as president and CEO of Krueger Ringier.

Krueger Ringier Inc. posted a sales gain of 13% in fiscal 1987. Edward C. Nytko is president and CEO.

Gary Sigman/Black Star

Posting annual sales of $190 million for spot #24 on the list, Charles Communications, Long Island City, N.Y., continues to capitalize on the success of freestanding inserts, which it helped popularize as a promotional item delivered in Sunday and daily newspapers. Charles now offers a national publication called Product Movers FSI, which reaches 50 million people per week. To enhance that, the firm has developed new computerized job costing, inventory, and billing operations. It operates 10 sheetfed and 21 web offset press units.

Allen Bortner, who started with the company as a salesman at its inception in 1945, continues as chairman.

Foote & Davies, Atlanta, was taken private two years ago. In fiscal 1987 it gained 8% in overall sales, rising to $185 million and #25 ranking on the GAM 101 list. The general commercial and publication printer operates plants in Atlanta and Lincoln, Neb. (equipped with four sheetfed and 163 web offset press units), and has a subsidiary called Atlanta Color Concepts, which is a color separation unit.

Frank E. Kutcher Jr. continues as president, chairman, and CEO of the firm.